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World Production and Trade

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United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 16-87

April 22, 1987

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

GRAIN AND FEED

CANADA Expands Application of Import Duty. Canada has expanded the coverage of its countervailing duty (CVD) to apply to all mixtures containing corn, according to U.S. agricultural counselor in Ottawa. Previously, mixtures with one-third corn or less were exempt. This change applies to goods released from customs on or after April 6. The measure is not expected to have much impact on trade volume since it will not affect the large feed corn deliveries to British Columbia that were exempted. However, in response to claims of hardship by Canadian corn processors, a further review has been scheduled for this month.

EUROPEAN COMMUNITY To Increase Intervention Stocks of Corn. In an unusual move, the European Community (EC) Commission has opened a late June intervention tender for 1 million metric tons of French and Spanish corn. Since intervention purchasing normally ends April 30, this extension may be a move to firm domestic markets in expectation of the impending import of 2 million tons of U.S. corn under the U.S.-EC agreement on compensation for EC enlargement. Expanded intervention stocks of corn could bring additional pressure on the EC to continue and even enlarge its unprecedented subsidized corn export campaign. So far, the EC has authorized nearly all of the current 500,000 ton open tender for free-market subsidized corn exports.

OILSEEDS AND PRODUCTS

USDA Raises Export Estimates. USDA announced the following changes for U.S. oilseed and product export forecasts for 1986/87: soybean meal increased by 136,000 metric tons to 5.897 million tons; sunflowerseed crush and oil exports increased by 75,000 and 35,000 tons to 625,000 and 175,000 tons, respectively.

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DAIRY, LIVESTOCK AND POULTRY

EC Swine Production Increasing. December 1986 swine numbers in the EC (excluding Spain and Portugal) rose 3.6 percent to 84.9 million, up from 81.9 million in December 1985, according to the EC statistical office. Sow numbers were up 2.8 percent. The increase in hogs was highest in France, up 9.5 percent, and the Netherlands, up 8.9 percent. The increase in France may be due, in part, to a revision in census methods. In the Netherlands, the increase came about, in part, as farmers pushed to expand their herd size before new rules on manure disposal can restrict herd expansion. Numbers were down slightly in West Germany and up slightly in the United Kingdom and Italy. In Denmark and Belgium, two major exporters, numbers were up 3.5 and 7.6 percent, respectively. EC hog slaughter for 1987 is projected up 2.3 percent to 135.1 million head. This is slightly less than last year's increase.

Prospects Decline for BRAZILIAN Broiler Production. The Brazilian broiler production forecast for 1987 has been lowered to 1.72 million tons from the previous forecast of 1.80 million, according to the U.S. agricultural counselor in Brasilia. Causes of the change are reported to be productivity problems for the hatchery supply flock and less likelihood of a significant increase in demand. The productivity problems that have lowered the supply of hatching eggs are due to abnormally hot weather since January and to fertility problems in the central south. Demand prospects have moderated as better supplies of red meats are expected to limit domestic poultry meat demand to a 5-8 percent increase rather than the 14 percent forecast earlier. It also appears exports may decline rather than increase as expected previously.

NETHERLANDS Announces Further Cuts in Dairy Quota. The Netherlands has announced a 7-percent cut in national milk deliveries, 1 percent more than the required 6-percent EC quota cut for the 1987. The dairy industry objected, fearing that dairy exports may drop by as much as 60 percent over the next two years. The additional 1-percent quota will be redistributed by the government for hardship cases, programs for land consolidation and to increase other farmers' base. The quota reductions are expected to have limited impact on the depressed world market for dairy products as long as the EC continues to have huge stocks.

CHILE'S Foot and Mouth Disease To Require at Least One Year To Eradicate. It is now estimated that at least one year will be required to eliminate foot and mouth disease (FMD) from Chile. Since the first outbreak of FMD was confirmed March 12, more than 5,000 animals have been slaughtered and the government is considering compensation to affected producers. Due to the seriousness of the outbreak, some imports of beef are likely, probably boneless meat from Argentina. Despite lower prices from New Zealand, some opportunities also exist for U.S. beef liver exports due to more frequent ocean transportation between the United States and Chile.

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COTTON AND FIBERS

Outlook Improves for U.S. Cotton Exports to YUGOSLAVIA. Yugoslavia's cotton import program has experienced difficulties this year with three of their major suppliers. Purchases from the Soviet Union are expected to be down 21,000 bales from the 347,000 bales specified in a bilateral trade agreement. Also, the 85,700-bale agreement with China is in doubt and the 30,000 bales expected from Egypt have been reduced to 11,000 bales. Collectively, these problems may improve the outlook for U.S. cotton sales this year. U.S. exports to Yugoslavia during the 1984/85 and 1985/86 marketing years were 165,000 bales and 55,000 bales, respectively.

BRAZIL May Need To Import Cotton. The U.S. agricultural counselor has reduced the 1986/87 cotton crop forecast in Brazil to 3.26 million bales, down 115,000 bales, based on an expected smaller harvest in the center south. Exports are expected to remain as earlier forecast. However, Brazil may import cotton on a drawback basis to supply the mills during the second half of 1987 due to a shortage of good quality cotton, according to trade sources.

U.S. Cotton Exports Climb in February. U.S. cotton exports reached 530,700 bales in February, 15 percent more than the January level of 459,000 bales and more than double a year ago. Japan, the EC, South Korea and Taiwan were the leading destinations. Total 1986/87 crop year exports are forecast at 6.7 million bales.

FRUITS

WORLD Commercial Pineapple Production To Increase in 1987. World commercial production of pineapple is currently forecast at over 5.5 million tons, 3 percent greater than 1986. Thailand is expected to remain the leading producer with a 1987 crop of 1,781,250 tons. This is a 9-percent gain over last season's weather-damaged harvest of 1,635,723 tons. The projected increase reflects favorable growing conditions, a larger harvested area and higher grower prices.

The Philippines' 1987 harvest is forecast at 1,670,000 tons. An unusually long dry spell continues in the growing areas of Luzon and Mindanao, moderating yield potential and possibly jeopardizing the 1988 crop. However, a 7-percent increase in projected harvested area is expected to offset this year's decline and result in a 3-percent production gain on the season.

Pineapple production in the United States is forecast at 589,670 tons, marginally above last year. New plantings are increasing, but at a slow rate. The industry appears to have stabilized--with the emphasis shifting toward production of fruit for fresh consumption.

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Favorable weather conditions and an expanded harvest area are expected to boost Mexico's 1987 crop to 306,000 tons, 5 percent above the 1986 volume. Yields are forecast to remain static as high input costs and tight credit reduced fertilizer and insecticide use. Fruit quality appears to have been compromised based on reports of above normal infestations of acarus and nematodes.

Total production in Cote d'Ivoire (the Ivory Coast) is expected to decline to 274,000 tons in 1987, despite favorable weather and further expansion of cultivated area. Production usually varies depending on the strength of export prices. While output of pineapples for processing has steadily declined due to weak export prices of processed pineapples, the volume produced for fresh export has been increasing. However, some of this growth has been moderated by the government's imposition of a quota on fresh exports and the suspension of new production licenses.

Prospects for the 1987 South African crop appear excellent, although unseasonably hot weather during February resulted in some softening and sunburn of early season fruits destined for canning. Total production is forecast at a record 255,250 tons due to an increase in planted area and advances in production technology.

After a near record harvest last season, production in Kenya is expected to return to a more normal level. The 1987 crop is forecast at 197,000 tons due to excellent growing conditions and a 5-percent increase in harvested area. Increasing competition from Asian producers has compelled the industry to maintain high quality standards, while maximizing yields and minimizing costs. Ongoing research programs address the industry's need for higher yielding varieties, improved cultivation techniques and chemicals that will raise productivity.

Given favorable weather, the 1987 harvest in Taiwan could reach 160,000 tons, 3 percent above the 1986 level. If realized, this would be the fourth consecutive production increase, reflecting a steady gain in planted and harvested area.

Malaysia's pineapple industry is expected to undergo another disappointing season, as both area and production decline for the second consecutive year. The decline in area reflects the conversion of approximately 1,000 hectares of privately-held cannery land to oil palm cultivation. The crop is currently forecast at 144,700 tons, 16 percent below last year. Short supplies of fresh product are a continuing problem, particularly for government-owned canneries. Consumer preference for a variety of fruits has resulted in greater competition from locally-produced papaya and bananas and imported apples, pears and citrus. Smallholder pineapple acreage and output has all but disappeared, dropping from a high of 205,000 tons in 1970, to only 17,000 tons in 1986. Higher paying jobs in other areas--mainly on the large estates--primarily are responsible for the decline. The introduction of two new hybrids has, however, improved quality and yields and negated serious disease problems.

For the past three years, Australia's pineapple industry has fared well--the impetus being a thriving processing sector to absorb domestic output. In 1986, the crop reached a record 153,487 tons due to a sharp increase in planted area. Further expansion in plantings is expected during the 1987 and 1988 seasons. Prospects for the 1987 harvest were dampened by hot, dry weather in Queensland, the major growing area. Consequently, the 1987 harvest is forecast at 138,000 tons--10 percent below last year. If realized, it would still rank as the second largest crop in the industry's history.

The following table shows area planted and harvested in hectares for selected countries.

	Area planted			Area harvested		
	1985	1986	1987 1/	1985	1986	1987 1/
Australia	6,268	7,227	7,300	3,769	4,416	4,500
Cote d'Ivoire	10,700	11,500	11,800	3,580	3,830	3,950
Kenya	3,272	3,265	3,341	2,139	2,112	2,205
Malaysia	16,738	15,200	13,800	NA	NA	NA
Mexico	8,000	7,000	8,000	6,500	6,500	6,800
Philippines	59,530	59,934	63,114	36,936	37,159	39,762
South Africa	31,000	31,450	31,600	NA	NA	NA
Taiwan	5,352	5,500	5,600	4,676	4,800	5,000
Thailand	95,383	88,997	96,000	74,519	70,529	75,000
United States	13,960	14,490	14,570	---	---	---
Total	250,203	244,563	255,125	---	---	---

1/ Forecast

The following table shows pineapple production in metric tons for selected countries.

	1985	1986	1987 1/
Australia	124,500	153,487	138,000
Cote d'Ivoire	294,764	276,334	274,000
Kenya	167,000	231,000	197,000
Malaysia	182,420	174,058	144,700
Mexico	325,000	292,500	306,000
Philippines	1,601,922	1,635,000	1,670,000
South Africa	247,600	247,900	255,250
Taiwan	149,745	155,839	160,000
Thailand	1,768,944	1,635,723	1,781,250
United States	512,560	586,050	589,670
Total	5,374,455	5,387,891	5,515,870

1/Forecast

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CREDIT NOTES

USDA Announces Additional GSM-102 Credit Guarantees for ALGERIA. USDA's action provides \$3.0 million in coverage for sales of U.S. rice. The cumulative GSM-102 fiscal 1987 program for Algeria now stands at \$469.0 million.

USDA Amends Guarantees for IRAQ. USDA transferred \$12.0 million from U.S. hatching eggs and \$7.0 million from breeder livestock to increase coverage on sales of U.S. protein concentrates from \$25.0 million to \$44.0 million.

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of April 16, 1987, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS
66. Turkey rice	Apr. 3, 1987	70,000
65. Colombia barley malt	Apr. 3, 1987	15,000
64. Iraq table eggs	Feb. 20, '87	189 million eggs
63. Canary Islands poultry	Feb. 9, '87	5,000
62. Nigeria wheat	Jan. 28, '87	500,000
61. China wheat	Jan. 26, '87	1,000,000 COMPLETE
60. Iraq wheat	Jan. 16, '87	800,000 Sold 440,000
59. Switzerland barley or sorghum	Jan. 16, '87	250,000 Sold 9,000
58. Poland wheat	Jan. 7, '87	500,000 COMPLETE
57. Poland barley or sorghum	Dec. 31, '86	200,000 Sold 137,000
56. Romania wheat	Dec. 23, '86	250,000
55. Iraq poultry	Dec. 22, '86	60,000 Sold 25,000
54. Dominican Republic table eggs	Dec. 9, '86	25 million eggs Sold 11.1 million eggs
53. Zanzibar wheat flour	Dec. 9, '86	20,000
52. Tunisia barley	Dec. 1, '86	150,000
51. Gulf countries (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	1,500 head Sold 740
50. West Africa (Cameroon, Cote d'Ivoire, Ghana, Togo) wheat	Oct. 30, '86	345,000 Sold 89,500
49. Dominican Republic poultry	Oct. 29, '86	1,500 Sold 1,133
48. Philippines barley malt	Oct. 20, '86	60,000 Sold 25,000
47. Cameroon wheat flour	Oct. 14, '86	20,000
46. Romania barley	Sept. 24, '86	200,000 Sold 125,000
45. Venezuela barley malt	Sept. 4, '86	100,000
44. Cyprus barley	Aug. 26, '86	150,000 Sold 108,000
43. Canary Islands wheat	Aug. 8, '86	100,000

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

42. Egypt semolina	Aug. 6, '86	30,000	Sold 23,000
41. Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40. Canary Is. dairy cattle	July 28, '86	3,000 head	COMPLETE
39. Hong Kong table eggs	July 28, '86	44 million eggs	Sold 22.0 million eggs
38. Senegal wheat	July 17, '86	100,000	COMPLETE
37. India vegetable oil	July 8, '86	25,000	COMPLETE
36. Jordan barley	June 17, '86	60,000	
35. Israel barley	June 17, '86	200,000	Sold 66,682
34. Tunisia dairy cattle	May 29, '86	4,000 head	COMPLETE
33. Algeria dairy cattle	May 29, '86	5,000 head	COMPLETE
32. Sri Lanka wheat	May 16, '86	125,000	COMPLETE
	March 5, '87	95,000	Sold 85,000
31. Saudi Arabia barley	May 7, '86	500,000	COMPLETE
	Aug. 6, '86	250,000	COMPLETE
	Sept. 16, '86	300,000	COMPLETE
	Oct. 8, '86	200,000	COMPLETE (201,000)
	Jan. 5, '87	1,250,000	COMPLETE
30. Algeria barley	Apr. 17, '86	500,000	
29. Morocco dairy cattle	Apr. 16, '86	4,000 head	COMPLETE
28. Turkey dairy cattle	Apr. 16, '86	5,000 head	COMPLETE
27. Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
	Sept. 12, '86	10,000 head	Sold 2,801
26. Yemen poultry feed	Apr. 14, '86	150,000	Sold 7,000
25. Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
	June 24, '86	200,000	COMPLETE
	Oct. 7, '86	500,000	Sold 93,050
24. Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
23. Syria wheat	Apr. 8, '86	700,000	CANCELLED
22. Benin wheat	Apr. 7, '86	45,000	Sold 30,000
21. Algeria table eggs	Apr. 4, '86	500 million eggs	
20. Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 445
19. Jordan wheat	Mar. 19, '86	75,000	COMPLETE
	June 20, '86	75,000	COMPLETE
	Dec. 31, '86	225,000	COMPLETE
18. Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
	Aug. 22, '86	800,000	Sold 250,000
17. Algeria wheat flour	Feb. 25, '86	100,000	
16. Algeria semolina	Feb. 11, '86	250,000	Sold 30,000
15. Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
14. Zaire wheat	Dec. 27, '85	35,000	COMPLETE
	May 15, '86	45,000	COMPLETE
	Oct. 17, '86	40,000	Sold 25,000
13. Nigeria barley malt	Dec. 10, '85	100,000	Sold 23,700
12. Iraq wheat flour	Dec. 9, '85	150,000	COMPLETE
	Jan. 7, '87	175,000	Sold 25,000

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

11. Egypt poultry	Nov. 26, '85	8,000	COMPLETE
	Mar. 21, '86	15,000	COMPLETE
	June 18, '86	5,000	COMPLETE
	July 8, '86	15,000	COMPLETE
	Dec. 19, '86	25,000	Sold 12,500
	Feb. 27, '87	6,000	
10. Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
	May 15, '86	30,000	Sold 15,000
9. Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
8. Jordan rice	Nov. 8, '85	40,000	Sold 38,700
	Jan. 13, '87	60,000	
7. Turkey wheat	Oct. 16, '85	500,000	COMPLETE
			(506,600)
	May 8, '86	500,000	Sold 248,000
6. Morocco wheat	Sept. 30, '85	1,500,000	COMPLETE
	Dec. 9, '86	790,000	Sold 260,000
5. Yemen wheat	Sept. 6, '85	100,000	COMPLETE
	Jan. 26, '87	100,000	Sold 25,000
4. Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
	Apr. 14, '86	100,000	COMPLETE
3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE
			(512,500)
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	Sold 29,000
	Oct. 8, '86	1,000,000	Sold 406,000
2. Egypt wheat flour	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	
1. Algeria wheat (ex durum)	June 4, '85	1,000,000	COMPLETE
wheat (ex durum)	Apr. 10, '86	1,000,000	Sold 354,000
durum	Nov. 10, '86	300,000	COMPLETE
durum	Mar. 16, '87	300,000	Sold 72,000

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EXPORT ENHANCEMENT PROGRAM SUMMARY

Status as of April 16, 1987

Announced to Date 23,178,680 tons grains and products (grain equivalent)
 758 million table eggs
 140,500 tons frozen poultry
 52,500 head dairy cattle
 25,000 tons vegetable oil

Sold to Date 10,348,059 tons wheat
 1,446,876 tons flour (grain equivalent)
 2,840,682 tons barley
 72,610 tons semolina (grain equivalent)
 64,932 tons barley malt (grain equivalent)
 106,000 tons sorghum
 38,700 tons rice
 7,000 tons poultry feed
 25,000 tons vegetable oil
 81,633 tons frozen poultry
 38,311 head dairy cattle
 32,562,000 table eggs

Total Sales Value: \$1,435.1 million
 Estimated Bonus Book Value: \$953.8 million
 Market Value of Awards: \$665.9 million

TARGETED EXPORT PROMOTION PROGRAM

On April 21, USDA announced the following allocations under the Targeted Export Promotion Program:

Participant	Commodities	Amount mil. dols.
Alaskan Seafood Marketing Institute	Salmon, pollock, & herring	1.50
American Plywood Association/ Hardwood Export Trade Council	Structural panel and lumber products	1.98
American Seed Trade Association	decorative hardwoods Seeds for planting (forage,turf,field & vegetable)	0.35
California Avocado Commission	Avocados	0.42
California Cling Peach Advisory Board	Processed cling peaches & fruit cocktail	5.60
California Kiwifruit Commission	Kiwifruit	0.50
California Pistachio Commission	Pistachios, shelled and inshell	0.20

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Participant	Commodities	Amount mil. dols.
California Prune Board	Prunes	4.50
California Raisin Advisory Board	Raisins	9.80
California Table Grape Commission	Table grapes	0.45
Cotton Council International	Cotton	6.80
Eastern United States Agricultural & Food Export Council	High-valued foods	1.00
Export Incentive Program (by application)	Almonds	4.18
Export Incentive Program (by application)	California and Arizona citrus	10.50
Florida Department of Citrus	Florida fresh & processed citrus (primarily fresh grapefruit)	7.00
Leather Industries of America	Leather (sheetgoods)	1.50
Mid-America International Agri-Trade Council	High-valued foods	1.20
National Hay Association	Hay & hay products	0.30
National Peanut Council	Peanuts & peanut products	4.50
National Potato Promotion Board	Potatoes	2.55
National Sunflower Association	Sunflowerseed & products	3.00
Northwest Horticultural Council	Fresh pears	0.40
Northwest Horticultural Council	Fresh apples	1.50
Northwest Horticultural Council	Fresh cherries	0.12
Southern United States Trade Association	High-valued foods	0.80
Tobacco Associates	Tobacco leaf	0.90
U.S. Dry Pea & Lentil Council	Dry peas & lentils	2.50
U.S. Feed Grains Council	Corn, sorghum & barley	2.80
U.S. Meat Export Federation	Red meats, variety meats, & meat products	7.00
U.S. Mink Industry	Mink furskins (pelts)	1.50
U.S. Poultry & Egg Export Council	Poultry, eggs & products	6.50
U.S. Rice Council	Rice	3.50
U.S. Wheat Associates	Wheat	3.10
Walnut Marketing Board	Walnuts	7.00
Western United States Agricultural Trade Association	High-valued foods	1.95
Wine Institute	Wine(California)	2.60
Total		110.00

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Selected International Prices

Item	: April 21, 1987	: Change from	: A year
	:	: a week ago	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT
Wheat:			\$ per MT
Canadian No. 1 CWRS-13.5%.	146.00	3.97	-2.00
U.S. No. 2 DNS/NS: 14%....	137.00	3.73	-0-
U.S. No. 2 S.R.W.10/	129.50	3.52	+4.50
No. 3 H.A.D.....	160.00	4.35	-0.50
Canadian No. 1 A: Durum...	165.00	4.49	-2.00
Feed grains:			
U.S. No. 3 Yellow Corn....	89.00	2.26	+2.50
Soybeans and meal:			
U.S. No. 2 Yellow.....	208.50	5.67	--
Brazil 47/48% Soya Pellets	188.50	--	+1.50
U.S. 44% Soybean Meal.....	186.50	--	+0.50
U.S. FARM PRICES 3/			
Wheat.....	93.69	2.55	-2.20
Barley.....	72.11	1.57	-0-
Corn.....	59.45	1.51	+1.97
Sorghum.....	58.20	2.64 2/	+0.44
Broilers.....	1,044.98	--	-46.08
EC IMPORT LEVIES			
Wheat 5/.....	228.20	6.21	-0.40
Barley.....	220.95	4.81	-4.60
Corn.....	212.70	5.40	-2.05
Sorghum.....	219.65	5.58	+0.50
Broilers 4/ 6/ 8/.....	513.00	--	-4.00
EC INTERVENTION PRICES 7/ 9/			
Common wheat(feed quality)	221.30	6.02	-0.40
Bread wheat (min. quality)	231.60	6.30	-0.45
Maize.....	231.60	5.88	-0.45
Barley and all other feed			
grains, excluding maize.	221.30	--	-0.40
Broilers 4/ 6/.....	1,557.00	--	-32.00
EC EXPORT RESTITUTIONS (subsidies)			
Wheat	N.A.	--	--
Barley.....	N.A.	--	--
Broilers 4/ 6/ 8/.....	422.00	--	-4.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/ June delivery. N.A.=None authorized. N.Q.=Not quoted. Note: Basis May delivery.

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